



CALJOBS TRAINING



SETTING UP ALERTS AND CREATING A SEARCH LIST FOR YOUR CASELOAD



Click the Computer Icon to watch a training video on [this process.](#)



This presentation will explain the process of setting alerts and creating a search list in CalJOBS.

Setting Up Alerts for Your Caseload

- Alerts make staff aware of important upcoming dates for individuals on their caseload
- Helpful alerts include:
 - WIOA Activity Projected Start Date
 - WIOA Activity Projected End Date
 - IEP Goals
 - WIOA Soft Exit
 - WIOA Follow-Up



In order to use **Alerts**, you must have Case Management Groups created for your office. This is because the language of the alerts reads: “notify when an individual in your caseload...”.

You must assign yourself as the case manager of the individual in the program application to add them to your caseload.

My Alerts

Communications > Alerts > My Alerts

Alerts make staff aware of specific upcoming dates

Communications	
Messages	
Correspondence	
Alerts	My Alerts
Virtual Recruiter Alerts	Text Watch
Email Log	View System Alerts

Alerts are a helpful feature for case managers.

From the **Communications** left navigation menu, hover over **Alerts**.

Select **My Alerts** from the fly-out menu.

My Alerts

Modify My Alert Subscriptions

Alert Description

WIOA Activity Projected Start Date
This alert will notify you when an Individual in your case load has projected WIOA activity start date that is about to occur.

Days

None Selected
1 day prior
5 days prior
15 days prior
30 days prior

Notify

On the day only
 Everyday after

- Click **Modify My Alert Subscriptions**
- Select any Alerts to set

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Click **Modify My Alert Subscriptions** and select which alerts from the list you would like to set.

Alerts are listed by category: Individual Registrant, Job Order Alerts, Eligible Training Provider, Wagner-Peyser, WIOA (Title I), Trade Adjustment Assistance, Generic Program, Miscellaneous, IEP, and Employer-Profile alerts.

Workforce Innovation and Opportunity Act (WIOA) Alerts

	Alert Description	Days	Notify
<input checked="" type="checkbox"/>	WIOA Activity Projected Start Date This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	1 day prior	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Activity Projected End Date This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Soft Exit This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Male Participants about to turn 18 This alert will notify you when an Individual in your case load is about to turn 18 years of age.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Younger Youth Goals About to Expire This alert will notify you when an Individual with Youth Goals is about to expire where the status is set but attainment is pending.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Participants expiring work authorization This alert will notify you when an Individual in your case load whose authorization to work is about to expire.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Followup Alert This alert will notify you when an Individual in your case load has a follow-up date that is nearing.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Literacy Numeracy Pre-Test has not been posted This alert will notify you when a Youth is enrolled that meets the requirement for literacy numeracy testing has not had a pre-test posted within 60 days of their first youth service date.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	WIOA Pre-Applications Pending This alert will notify you of pending WIOA Pre-Applications that are completed by individuals.	N/A	N/A
<input type="checkbox"/>	WIOA Literacy Numeracy Post-Test has not been posted The following individual(s) in your case load who have Literacy Numeracy Pre-tests approaching their anniversary date in XX days XX (From Number of Days (e.g. 15)) as of SYSTEM DATE. You should update the literacy numeracy records appropriately.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity This alert will notify you when an Individual in your case load has not generated any new WIOA activity since the number of days specified.	None Selected	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after

Click in the box to the left of the **Alert Description** you would like to select, then indicate when you would like to receive the alert in the **Days** column.

Finally, indicate whether you would prefer to receive the alert on the **On the day only** or **Everyday after**.

Creating a Search List

- Valuable case management tool for quickly accessing lists of individuals that you are actively serving.
- Staff can view, add, and create multiple lists of individuals or employers.



Saved Lists

Individuals Assisted: [Garcia Ocampo, Karen \(KGARCIA1234\)](#), [Gray, Donovan \(DONOVAN12345\)](#), [Sanchez, Timmy \(TIMMY1234\)](#), [Perez, Leo \(LEOPEREZ1\)](#), [Love, Valentino \(VALENTINO2000\)](#)

Employers Assisted: [Valentino Pet Shop \(MKT34355\)](#), [Marie's Donuts \(MKT36830\)](#), [Sharks Production \(MKT34523\)](#), [Chetna's Bakery \(CHETNABAKERY\)](#), [Victor's Subs \(MKT36712\)](#)

Filter your lists by type:

List Title	Create Date
My Individuals	8/8/2019

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Search Lists are an excellent case management tool to quickly access lists of individuals on caseload or employers actively serving.

Staff can view, add, and delete multiple users and create multiple lists. **Search Lists** can be accessed from the **Search Lists** option within the **My Staff Resources** section from the left-hand menu.

Creating a Search List

The screenshot displays a web application interface with a left-hand navigation menu and a main content area. The navigation menu includes sections like 'My Reports', 'My Staff Workspace', and 'Services for Workforce Staff'. The 'My Staff Resources' option is highlighted with a red box, and a dropdown menu is open, showing 'Search Lists' also highlighted with a red box. The main content area features several widgets: 'Active Case Load' with counts for WP, WOA, TAA, and GEN; 'My Report Indicators' with a 'Case Status' legend; 'Staff Productivity' with a bar chart titled 'Staff Productivity by Program' for the period 3/18 to 4/17; and 'Saved Lists' with a list of individuals and employers assisted. The interface is clean and professional, with a blue and white color scheme.

Search Lists are an excellent case management tool to quickly access lists of individuals on caseload or employers actively serving. Staff can view, add, and delete multiple users and create multiple lists. **Search Lists** can be accessed from the **Search Lists** option within the **My Staff Resources** section from the left-hand menu.

Select Recipient Type

Home My Dashboard Sign Out Services for Individuals Services for Employers

CalJOBS Use this page to manage your search lists. You may select or delete items by clicking the associated link in the Action column below.

To sort on any column, click a column title.

Filter your lists by type:

List Title	List Type	Create Date	Action
My Employers	Employers	12/15/2016	Select Delete
My People	Individuals	11/09/2017	Select Delete

My Staff Dashboard

Lists can be created for individuals, employers, or providers. From the drop-down select the type of list you would like to create or edit, and existing lists will populate or you will have the option to create a new one.

Click on New Individual Search

Home My Dashboard Sign Out Services for Individuals Services for Employers

CalJOBS™ Use this page to manage your search lists. You may select or delete items by clicking the associated link in the Action column below.

Filter your lists by type:

To sort on any column, click a column title.

List Title	List Type	Create Date	Action
My People	Individuals	11/09/2017	Select Delete

[New Individual Search] [Upload Individuals]

My Staff Dashboard

In this example, we selected the **“Individuals”** option. Next, we will select the **New Individual Search** link to add individuals to an existing list.

Add Individuals to Lists

Home My Dashboard Sign Out Services for Individuals Services for Employers Quick Search

Rochelle	Medeiros	7051	1000968134	03/10/2016	Y	01/14/2015	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input checked="" type="checkbox"/>
Tawana	Cameron	1271	752446748	07/31/2017	Y	08/03/2017 12/06/2012	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input checked="" type="checkbox"/>
Brittni	Walker	9038	1000993204	05/29/2015	Y	02/04/2017 01/30/2015	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input checked="" type="checkbox"/>

Save New List
Update Existing List

32 Records found

Records per page: 100 Go

[New search criteria] [Modify current criteria]

Select an existing list so that you can add the selected users above.
List Title: My People
[Save] [Cancel]

Records per page: 100 Go

On the results page, select the box for the individual(s) we would like to add to the list. Then, select the **Update Existing List** link. A pop-up will appear near the bottom of the page where you choose which list you would like to update with the new individual(s).

Note: If you were creating a brand new list, not editing an existing list, the **Update Existing List** link would read **Create a new List**, and the pop-up box would instruct you to name the new list you are creating.